

Portfolio Form for LP Applications

Instructions

In accordance with [Rules for Licensing Paralegals \(RLP\) 6.1](#), applicants must submit a portfolio that establishes their learning, knowledge, and ability:

- (a) The portfolio shall demonstrate competent levels in the qualities, skills, learning, and abilities set out in RLP 5.4 and 5.5.
- (b) The portfolio materials should, at a minimum, include a significant body of work in the area of law in which an applicant is seeking Endorsement. Additionally, the portfolio should demonstrate a firm understanding of the types of work that are both within and outside the applicant's Scope of Practice¹, and an understanding of when a LP must refer a client to a qualified lawyer.
- (c) The Committee shall review an applicant's portfolio and determine whether the applicant meets the standards and requirements set out in section 5 of the LP rules. If the portfolio provides insufficient materials to assess whether an applicant meets the standards or requirements set out in section 5, the Committee shall request additional materials from the applicant addressing those specific missing standards or requirements.

The LP Assessment Committee (LPAC) was charged with setting the criteria for artifacts or documents that may be included in a portfolio; recommending the composition of subject matters for a portfolio; identifying the types of documents that will demonstrate an applicant's learning and abilities in the relevant subject matter; and other limitations or requirements needed for an efficient review by graders. The LPAC left further refining of requirements to the Admissions Department and the Committee of Paralegal Assessors (CoPA).

Based on the recommendations of LPAC, the following Portfolio requirements must be adhered to:

- Applicants must submit 12 separate items from their work product that were created or developed within the 3 years immediately preceding the date of their application.
- Each item should be no less than 500 words and no more than 5,000 words. The total word count for all 12 items should not exceed 30,000 words. The reason for this limitation is to emphasize to applicants that the graders will give merit points for brevity.
- Applicants must submit a cover form with each item that identifies the Category of Core Competency for which the item is submitted (see chart below), and describes the item's purpose or goal and context in which it was drafted.

¹ Scope of Practice is a defined term in the RLP 1.1(w) and is referenced regularly throughout the RLP.

- Purposes or goals may have been set by their supervising attorney or their client.
- The context should come from the facts or events that led up to the drafting of the document.
- The portfolio must contain 12 documents or artifacts in the following Category of Core Competencies:

Category of Core Competency	Items Needed
Document Production, Negotiation, & Litigation	4
Client Communication	2
Professional Responsibility	2
Legal Writing	1
Research	1
Technology	1
Office Management & Business Practices	1

- To ensure the correct item count shown above, applicants must submit 12 separate document or artifacts with each document or artifact representing one Category of Core Competency.
- There will be an opportunity for applicants to correct errant submissions that do not meet minimum competency or other portfolio requirements. Oregon State Bar staff will notify applicants if a document or artifact is deficient. Applicants will have 30 days from the date of notice in which to cure the deficient document(s) or artifact(s); however, applicants may not submit more than three attempts at curing the deficiencies of any document. Applicants who fail to cure the deficient document(s) or artifact(s) within 30 days or three attempts shall fail the Portfolio Exam.

You must submit your completed portfolio at the same time as your application.

Portfolio Cover Form for Individual Item

Complete one Cover Form for each document submitted

Applicant No. _____

Document or artifact title: _____

Representations to ensure a valid Document or Artifact submission.

Mark in the chart below the Category of Core Competency for which the item is being submitted:

X	Category of Core Competency
	Document Production, Negotiation, & Litigation
	Client Communication
	Professional Responsibility
	Legal Writing
	Research
	Technology
	Office Management & Business Practices

Identification of Relevant Document:

Identify the substantive paralegal task(s) that was accomplished with the attached work product (See the non-exhaustive [lists in Exhibits 3 & 4 at this link](#)):

Context: Identify the context in which this document or artifact was drafted (what events led up to the document or artifact being created and necessitated the use of the attached work product).

Goal(s): Identify goal(s) set by the applicant's supervising attorney or client for which the attached document was created.

Relevant Total Word Counts (answer each of the following True/False questions):

Combined word count of the Context and Goals above is between 200 and 600 words:	True	False
The total word count for the attached work product is between 500 and 5000 words:	True	False
The total word count of my entire portfolio does not exceed 30,000 words:	True	False

NOTE: DO NOT SUBMIT any documents for which the answer is false!

Identify purpose for which attached document/artifact was created or developed (check all that apply):

- For use by my firm, , in the representation of a client or consultation with a potential client
- For use by my firm for office management or business practice purposes
- For submission in an academic course focused on paralegal studies
- Solely to meet a requirement for this portfolio submission

NOTE: DO NOT SUBMIT any documents or artifacts that were created solely to satisfy a portfolio requirement! Replace with a document or artifact satisfying at least one of the other three purposes stated above.

Recent Work Product: The attached work product was created or developed within 3 years of the date of my application: **True** **False**

NOTE: Do not submit documents older than 3 years from application date!

Work Product Substantially Completed by Applicant: The attached work product reflects work that was substantially completed by me. Only minimal edits were made prior to submission for a final grade on the work product; or for use by my firm or supervising lawyer; or before being presented to any client, adverse party, tribunal, or other relevant recipient. **True** **False**

NOTE: Do not submit documents with an answer of false!

Document or Artifact allows for assessment of Essential Eligibility Requirements in RLP 5.4 & 5.5:

The attached work product, coupled with this cover form, demonstrates one or more of the following:

1. A level of judgment and diligence that would result in competent representation of the best interests of clients, and justifies the trust of clients, adversaries, courts, tribunals, interested third parties and the general public with respect to all professional duties owed **True** **False** ;
2. My knowledge of the fundamental principles of family law and my understanding of how to apply legal principles to the issues and facts presented in the above referenced contexts and purpose/goal **True** **False** ; and
3. My ability to competently provide fundamental legal skills commensurate with a Licensed Paralegal **True** **False**

NOTE: DO NOT SUBMIT documents for which all the answers are false!

Redactions: I have redacted any and all references to the following names:

1. My name **True** **False** ;
2. My supervising attorney's name **True** **False** ;
3. The name of my law firm or employer **True** **False** ;
4. Any adverse or co-party's name **True** **False** ;
5. The name of opposing counsel or the law firm that they represent **True** **False** ;
6. The true names of any children relevant to a legal matter **True** **False** ;
7. References to any codes, numbers, or other data that might result in litigant, attorney or law firm identification or a security or data breach **True** **False** ; and
8. When possible, I have replaced the redacted names or data with titles that allow the assessor to identify the type of information that was redacted, and thereby permits a more complete assessment **True** **False** .

NOTE: DO NOT SUBMIT any documents for which the answer on items 1-8 above is false!

Attestations, Declarations and Representations

By entering my applicant number in the relevant field below and dating the adjacent date field, I hereby affirm that all of the above representation are true and accurate. Additionally, I hereby declare that I have submitted to the Admissions Department of the Oregon State Bar, a signed declaration that affirms all of the representations made on each of the twelve cover forms submitted with the twelve documents currently making up my portfolio that has been submitted for assessment to the Committee of Paralegal Assessors, and that my supervising attorney or a knowledgeable member of the law firm for which I work has also confirmed that such representations are accurate to the best of their knowledge.

Applicant Number	Date of Submission
App No.	Date

Portfolio Checklist	
☐ ☐	First Document Production, Negotiation, & Litigation document or artifact Cover form Document or artifact
☐ ☐	Second Document Production, Negotiation, & Litigation document or artifact Cover form Document or artifact
☐ ☐	Third Document Production, Negotiation, & Litigation document or artifact Cover form Document or artifact
☐ ☐	Fourth Document Production, Negotiation, & Litigation document or artifact Cover form Document or artifact
☐ ☐	First Client Communication document or artifact Cover form Document or artifact
☐ ☐	Second Client Communication document or artifact Cover form Document or artifact
☐ ☐	First Professional Responsibility document or artifact Cover form Document or artifact
☐ ☐	Second Professional Responsibility document or artifact Cover form Document or artifact
☐ ☐	One Legal Writing document or artifact Cover form Document or artifact
☐ ☐	One Research document or artifact Cover form Document or artifact
☐ ☐	One Technology document or artifact Cover form Document or artifact
☐ ☐	One Office Management & Business Practices document or artifact Cover form Document or artifact

Return this Form with Completed Portfolio